TechBoost
2016 - The Year to say Goodbye to Shared Drives

Shared Drives are the biggest competition facing any SharePoint or Enterprise Content Management (ECM) deployment. A recent study by AIIM found that even after deployment of an ECM system, half of all content sat outside of ECM. The study also found that while 34 percent of organizations had planned to shut down their file-shares, only 3 percent had actually done so.

Users love the simplicity of the Shared Drive (AKA File-Share) interface. The familiar Windows Explorer folder tree is deeply ingrained into our work psyche to the point where it has become second nature. So, it's no wonder that SharePoint and ECM projects that attempt to move content and users into a new system see tremendous resistance from the user base.

TechBoost has worked with some of the industry's most innovative technology developers. We have assembled the technology and process to allow you to receive the full benefits of SharePoint or an ECM system and shut down the shared drives for good, with zero change management required for your users…in fact they may not even know what happened!

The roadmap to shutting down Shared Drives is here.

Choosing your Battles - Shared Drives vs SharePoint / ECM

Is a new User Interface really your SharePoint/ECM goal?

Very few organizations set out with the goal to provide users with a new interface to access files. Rather this tends to be an unfortunate requirement of the real business reasons for which these systems are deployed, such as, Improved Searching, Records Management, Workflows, etc. Separating the targeted functionality from the User Interface through which it is accessed, is a critical step in addressing the Change Management mountain that halts most deployments.

Of course, the native interface of your SharePoint or ECM system should be available as a user interface, as it will feel very comfortable for some users. However, you should not have to force all users to a new interface in order to reap the benefits of enterprise content management.

What should be done with legacy content?

Inevitably every SharePoint/ECM deployment has this question come up. What do you do with the millions of files on the shared drive? How can these be migrated to the new system without simply moving the mess from one location to another?

Certainly, the volume of legacy content is staggering, but not all files have equal value/risk to the organization. Legacy holdings are a mix of files that are actively being worked with or referenced, files that contain records critical to the organization, files of minimal business value, and ROT (redundant, obsolete and trivial files). Identifying these buckets and the effort you are willing to spend on each is the starting point for tackling legacy content.

What is the impact of relocating files?

The most common error migration projects make is failing to account for files interconnected through embedded links. These are files that reference other files through links that users rely on daily. Migrating files breaks these embedded links and can bring departments to a halt as critical information is no longer available.

By identifying high-value documents that contain links ahead of time, solutions can be easily be put in place to ensure links are retained as part of the migration process. Putting a plan in place to identify and preserve key file links is absolutely required in order to ensure the migration proceeds smoothly.

TechBoost leverages the following technology in this plan:

shinydocs

Shinydrive by Shinydocs Corporation drives adoption of your SharePoint or ECM investment with zero user training. Shinydrive can consolidate information scattered in shared drives, cloud repositories and even in My Document folders by migrating it to your SharePoint or ECM environment.

The process is invisible to the end user and requires no downtime or any disruption to the day to day work of your enterprise. Deliver complete compliance for all your business critical information.

Shinydrive's intelligent caching offers a smooth and responsive experience even in high latency, low availability environments where connectivity can be an issue. Ensure persistent access to corporate information for your globally distributed workforce.

FILEFACETS

Awarded the "Information Governance Technology Provider of the Year" for 2015 by the Information Governance Initiative and InfoGovCon, FileFacets is a powerful tool in shutting down Shared Drives. The software puts you in the driver seat to transform your existing cluttered file share data to your new organized information structure with its robust classification functionality.

Allowing you to identify ROT (Redundant, Obsolete and Trivial) in your shared drives, classify non-ROT files, attribute with metadata and migrate to SharePoint or ECM, FileFacets is a robust set of tools that can get your content out of the Shared Drives quickly.

LINKTEK

Unique in the industry, *LinkFixer Advanced* uses exclusive patented technology to safeguard embedded file links during file migration. The pre-migration Inoculate process and the post migration Cure process make protecting links during migrations simple, saving countless hours of manual link repairs.

LinkFixer Advanced supports link fixing upon migration to SharePoint and OpenText Content Server. Hyperlinks, OLE object links, paste-special links, VBA macro links, mail merge links and image links can be repaired in a wide variety of files such as Microsoft Word, Excel, PowerPoint, Access, Visio, Windows Shortcuts, Acrobat, InDesign, HTML, Flash, JavaScript, MicroStation and AutoCAD. LinkFixer Advanced is a critical step in any file migration project.

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The Plan: Shutting Down the Shared Drives

The purpose of this plan is not to discuss how to implement SharePoint or an ECM system. The goal is to discuss how to shut down your shared drives, once your SharePoint or ECM system is in place.

Your SharePoint/ECM system is up and running, and users are bouncing between it and the legacy shared drives. Some users and departments are adapting better than others to life in the new environment. However, at some point your team realizes that, to truly succeed, files need to be migrated into the system and the Shared Drives need to be turned off. Using the technology described above, you can do just that.

1. Start with the Drives

Users are primarily concerned with the User Interface. Maintaining the same user experience in the new environment will allow users to carry on as if no change has taken place, even though much more may be going on behind the scenes. Shinydrive does just this.

Installing Shinydrive allows you to select drives for replacement with Shinydrive, immediately unmapping the drive, so that no more files can be written to that location by users. Shinydrive then creates a new drive, accessed in exactly the same way, showing the same content that was visible in the original drive. From the users' point of view, nothing has changed.

In the background, Shinydrive is accessing the original drive as a legacy source and is mapped to SharePoint or ECM as a new destination and source. Whenever files are accessed by users they are retrieved from the original drive and migrated to the associated location in SharePoint or ECM. This takes place completely invisible to users whose user experience has not changed from that of accessing files on the original drive.

Over the next few months, users will unknowingly be identifying active content and migrating this content to the target system. Once in the target system and re-accessing a file through Shinydrive, they will be interacting with it with all of the security, RM, workflow, search and other capabilities of SharePoint or the ECM system. Search of SharePoint or ECM content can take place right from the Windows Explorer-like search option in Shinydrive.

Multiple network drives may be mapped to multiple SharePoint Libraries or ECM locations. Active files migrated by users simply accessing them will bring with them the same folder hierarchies as existed in the Shared Drive. The purpose of this activity is to identify active files, not to re-classify them.

In this first step Shinydrive provides a zero change management solution for onboarding users and identifying and migrating active files to the new system. Of course, during this process you may also choose to provide training to onboard some or all users to the native application (SharePoint/ECM) however this step is not mandatory and is dependent on your goals the deployment.

2. Tackle Legacy Content

The result of step one is a functional user environment, active content being migrated to the target system and zero pushback from the user community. With the system running effectively, we can now turn our attention to legacy content.

As files have been accessed and migrated from the Shared Drive to the target system via Shinydrive, these files have been removed from the original drive. Keep in mind the original drive where files were stored was unmapped for users, however the files still exist there. Over a matter of months active files are pulled from this drive by users accessing file via Shinydrive. This results in the original drive having active files removed and containing only Legacy files.

FileFacets can now be used to clean, classify and migrate the Legacy files of the original drive. The first step with FileFacets is to analyze the files for duplicates and trivial files and remove these files from the repository. Trivial files can be defined by files of a file extension, file age or file size that indicate they have no business value to the organization.

FileFacets supports the ability to complete detailed Folder Structure creation, File Classification and Metadata attribution. The key for your organization is to determine what level of effort you wish to invest in this legacy content. Given that you will likely have Millions (or even 10's or 100's of Millions of files), and that we have already determined that these are not active files, a sound approach may be to simply classify the files to your retention schedules. As the primary purpose of storing these files is to comply with Records Management policies.

FileFacets automated classification can be used to analyze files and assign them to the proper Retention Schedule, the proper location in the target system, and to append the files with additional metadata to make recalling the files in the future more effective via search.

All of FileFacets cleansing, classification and attribution work is completed in a test environment. Upon validating the result of the file processing effort, migration can take place directly to SharePoint or ECM. With this complete, the contents of the original drive has been completely cleaned, migrated, and now reside in the target system.

3. Cleanup the Target

You may have noted that the active files being transferred to the target system were simply bringing along the folder structure of the original drive. There is now an opportunity to make changes to this structure if there is interest and value in doing so. If the cleanup is extensive FileFacets could be used at this point to analyze and restructure the active files within the target system. The users would see some change at this point, as the folders represented within Shinydrive would be updated by this.

The requirement to take on this level of change would obviously be based on the state of organization (or disorganization) of the original drive as how this is reflected in the target system.

4. Prevent Missing Data and Upset Users

If you don't take care of your users' links when doing a migration, the result could be users opening their files and discovering some of their data is missing. Few things cause more user panic than missing data in files in which they have invested dozens or hundreds of hours.

While listed here as step four, the pre-work to maintaining links takes place at the beginning of the project, as activities which move or rename a file or part of its file path tend to break links. While fixing links after an event has taken place, is possible with *LinkFixer Advanced*, the Inoculate and Cure process will save work and will fix links automatically post-migration.

By scanning the original drive and inoculating the files there, *LinkFixer Advanced* identifies the Parent and Child files of each link and appends each with a unique link ID which can be used to re-establish a working link at any time. Upon migrating files into SharePoint or an ECM system, the Cure process of *LinkFixer Advanced* will find the matching link ID's in Parent and Child files and establish a working link in systems such as SharePoint or OpenText Content Server.

This process is simple to run pre and post migration, yet can save thousands of man hours of manual link fixing, and more importantly can save your team from an embarrassing situation where links are severed and the business users are left without access to critical information. This attention to detail can make the difference in a deployment that is well received and one that is met with ongoing resistance.

5. The Result

The simple process outlined here is the result of the combined experience, trial and error, and continuous improvement of Shinydocs, FileFacets, LinkTek and TechBoost. Finally, a proven set of industry leading tools is making it possible to:

- Achieve true Enterprise Content Management,
- Provide users with the User Experience they want,
- Clean, classify and migrate Legacy files,
- Shut Down Shared Drives,
- And do all of this with virtually no impact on the end users.

This project described here provides an opportunity to move your organization through one of the largest hurdles facing system deployments, information management, and user productivity.

About TechBoost

The team at TechBoost has a long history in the Enterprise Content Management industry. We have seen firsthand the challenges that clients face in implementing SharePoint and leading ECM systems. We believe that the technologies referenced in this document are providing new opportunities to tackle the most challenging information challenges facing successful content management.

By working with TechBoost you will receive independent guidance on the best technology for your project and a clear understanding on the processes in which solutions can be used together, such as that laid out in this document. Our deep relationships with leading technology vendors allow us to provide special pricing incentives when multiple technologies are combined from our selection of industry leading tools.

Contact us to discuss technologies and processes which can make the difference in your project.

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